

Effective Library Policymaking

Policymaking is one of the board's most important responsibilities. Policies are vital tools in carrying out the board's planning and evaluation decisions. Library policies established by the board govern and guide all phases of the public library's operation. Effective policies are management tools for running the library. The trustees, with the help of the director and staff, create these tools. The director and staff use them.

Benefits of Policy

- Determines the library's mission and roles and ensures that the library's goals and objectives, plans, and procedures support the mission.
- Guides the director and staff in implementing the board's decision.
- Provides direction and consistency in day-to-day services and operation.
- Assures that library users and staff are treated fairly and consistently.
- Encourages informed and active decision-making by anticipating needs and problems before they reach the crisis stage.

Who Makes Policy?

While only trustees have the legal responsibility and authority to make policy, experience shows that this process works best when the library director and staff are involved in researching options, drafting policies, and making reports and recommendations to the trustees. Again, as emphasized at the beginning of this manual, effective library services and development are the result of partnerships. The trustees, director, and staff should cooperate with one another and complement each other's efforts.

It is the **responsibility of the director and staff** to keep the trustees informed about progress and problems. They advise, assist, report, and recommend. When policy decisions are made, they implement the board's decisions, administering the library's programs within the framework of the board's policies, plans, and budget.

It is the **responsibility of trustees** to establish library policy. In so doing, they should solicit information and advice from the director, the staff, and the library's users. They ensure that policies are consistent with the library's mission and goals and are compatible with the library's conditions and circumstances. Because they understand that for a policy to be meaningful it must be implemented, trustees help the director and staff to understand, accept, and follow the policies they make.

Review and Revise

The environment the library belongs to is not static. Effective policymaking is flexible to reflect changing circumstances. A policy is rarely a finished product, but is more like a work in progress. Policies should be reviewed and revised periodically as changing circumstances, needs, and demographics dictate. Sometimes a change in policy is dictated from outside agencies. The need to address requirements of the *Americans with Disabilities Act* is a recent example of how library policy can be affected by changes in laws and attitudes in society. The issue of sexual harassment is another example.

As libraries face new developments, policies should be revised as a means of thinking about the meaning of such changes, addressing problems that arise, and taking advantage of new opportunities. To cite a common example, as new formats such as video or audio tapes become popular and are acquired, the collection development policy should be reviewed to reflect the change. Another issue is electronic access to information and how to provide it.

As policies are reviewed, keep in mind some key questions. Look for those policies which guide the general operation and development of the library. Are these policies still appropriate? Do they account for changes in the library's environment? Are the goals set by the board and plans designed to reach those goals consistent with these guiding policies? Examine each policy and ask if it is understood, still relevant, and enforced. What is missing? What new circumstances or needs require changes in policy? What problems or misunderstandings could be cleared up by changing a policy or making a new one? Are there legal issues, especially new ones, that the library's policies do not address?

Organizing a Policy Manual

All the library's policies should be recorded, compiled, and organized for ready access in a policy manual. The manual should include not only the policies written by the trustees, but those set by other governing authorities (local, state, and federal) which affect the library. For example, state and local officials often determine purchasing policies and personnel policies such as salary schedules, retirement, etc.

The contents of a policy manual can be arranged topically with headings that provide ready access. As policies are added or revised, the manual can be updated with date of adoption noted. This handbook should include the board's policies so that new trustees can become familiar with them at the beginning of their tenure. A separate manual can be created for public access. New staff members should also be acquainted with all relevant policies.

Making Policy: Creating Tools for Organizing and Managing

While policy may be viewed as a management tool for defining and coordinating relationships, describing library practices, assigning responsibility, and so on, the process of establishing or revising policy is an organizing tool. Policy-making provides the trustees, director, and staff with an excellent opportunity to understand the library's community, to evaluate the library's strengths and weaknesses, to reach consensus on the library's purposes and priorities, to clarify and strengthen relationships within the library, and to communicate the library's needs and achievements to the community at large. Policy-making that achieves such multiple goals usually requires broad participation.

Policy-making begins with a **statement of the problem** the policy addresses. A key question to ask is "how does this policy contribute to the mission and goals of the library?" What needs and reasons are there to change this policy or make a new one? Existing policies related to the policy in question need to be considered.

Next, **assignments are made**. Typically, the board will assign a committee, including the director and staff members, to make an assessment of the problem and an analysis of how the problems identified can be treated. The result may be a **list of available options**. Any analysis must consider:

- both long- and short-range effects of enacting the policy
- potential side effects of the policy positive and negative
- estimated costs of implementing the policy, including budget dollars, staff resources, building and equipment requirements, and collection implications
- legal implications of enacting and implementing the policy

Once assessment and analysis are completed, the working group **reports to the board**. The report may include recommendations. The committee will pass on to the board any relevant and supporting documents to be considered.

The **board reviews** the work and recommendations of the committee and makes the decisions that will shape the final policy. Often a first draft of the policy will be written, again, by a committee assigned by the board. The draft statement is distributed and reviewed by those who may be concerned or have helpful responses to contribute. After responses are considered, the board completes a final draft and formally adopts the policy in a business meeting.

Once the **policy is adopted**, it must be **introduced** to the staff. Training may be required. The policy should be **published and distributed** to all who may be affected or concerned. In communicating the policy, the board can use the policy itself as a public relations tool to tell the community they are working actively to improve the library and its services.

Broad participation in policy-making is important because it creates understanding and consensus. Those who contribute to making policy are more likely to accept it and implement it. The aims of a policy as a management tool are accountability, effectiveness, efficiency, and coordination. The aims of policy-making as an organizing tool are understanding and cooperation.

A Policy List for Public Libraries

Here is a list of policies that may be relevant to your library's needs. Every library does not necessarily require every policy on the list. It is provided to help boards check their policy accomplishments and needs. The list is arranged in the form of an outline to underscore how policies may relate to one another. Listed under each policy are items that may be considered and covered when making the policy.

I. Mission and Role Statement

II. Library Board Bylaws

III. Public Services or User-Related Policies

A. Eligibility for borrowing and services

1. Resident and non-resident
2. Interlibrary loan
3. Programming and outreach
 4. Unattended children
 5. Acceptable use of the Internet

B. Collection development policy

1. Mission and goals with community description
2. Responsibility for selection
3. Selection criteria for each format
4. Scope of collection and priorities
5. Selection procedures and vendor relations
6. Evaluation, weeding, and maintenance
7. Censorship, access, and challenged materials procedure
8. Intellectual Freedom Statement, Library Bill of Rights
9. Gifts and donations

C. Circulation policy

1. Loan period and renewal
2. Confidentiality
3. Reserved materials
4. Fines, damages
5. Special collections
6. Audiovisual equipment

Reference policy

E. Facilities policy

1. Hours of operation
2. *Americans with Disabilities Act* compliance

3. Security
4. Meeting room use
5. Exhibits and displays
6. Use of library equipment

F. Community relations policy

1. Cooperative borrowing agreements
2. Relations with schools
3. Public relations
4. Volunteers
5. Friends group

IV. Management Policies (The management practices of many public libraries fall under the authority of a city or town government which may have its own policies or contracts governing the items listed below. This list is provided as a reference for trustees as a description of what might be included in a management policy. References should be made to applicable city or town policies where they exist; the board should develop its own policies with the advice of local officials as need be when it addresses issues not covered by existing city or town policies or union contracts.)

A. General

1. Responsibility and authority
2. Budgeting and purchasing

B. Personnel

1. Responsibility and authority
2. Job descriptions and classification
3. Salaries and benefits
4. Hours, sick leave, overtime, holidays, and vacation
5. Hiring and termination
6. Performance evaluation and promotion
7. Continuing education and professional development
8. Discipline and grievances
9. Compliance with the *Americans with Disabilities Act* and EEO guidelines

C. Facilities

1. Responsibility and procedures for maintenance
2. Acquisition and ownership
3. Insurance and liability
4. Emergency preparedness
5. Use of equipment, vehicles, etc.

Personnel Practices

Human relationships determine the inner climate of the library. Every effort should be given to make these relationships cordially cooperative and mutually understanding. Chief among these relationships, because of its effect on the overall library administration, is that between the library

board and the library director.

The working relationships that prevail within the library determine the attitudes of librarians and staff, which in turn determine the quality of service offered to the public.

HIRING A NEW DIRECTOR

One of the most important functions of a board of trustees is the hiring of a competent library director. It may, in fact, be the most important single act undertaken by the board. Not only does it directly affect the future of the library, it also forces the board to step back and take a look at itself and the library. This informal evaluation process can result in new perspectives regarding the library's role in the community. Trustees should be aware of current practices in the profession, requirements imposed by Rhode Island public library standards, the current needs and direction of the library, and competitive professional salaries and benefits.

Preliminary Assessment

As soon as the vacancy is anticipated, the board should meet to formulate a plan of action.

The board should make a realistic appraisal of the situation. The members should decide what qualifications the library requires in a library director and what the library has to offer the director. Offer the best salary possible to secure the services of a qualified person. Consider any added incentives or challenges offered by the job opportunity.

Look at the current situation

- What are the current needs of the library?
- What qualifications are needed in the next director?
- What is the reason for the job opening? An exit interview can be very helpful. Is the departing director upward-bound, retiring, or dissatisfied?
- What changes, if any, are necessary to the job description and the qualifications statement?

The job description might include:

- areas of responsibility
- specific duties
- salary and fringe benefits
- initial period of evaluation
- desirable areas of expertise
- minimum qualifications and experience
- to whom the director is responsible

Method of Recruitment

A search committee can be formed consisting of three to five board members or board/library users. This committee selects a chair and establishes a procedure for the search process.

Items to be addressed might include:

- scope of the search (national, regional, local)
- timetable
- calendar of activities for the candidates
- affirmative action and equal employment opportunity requirements
- confidentiality and discretion
- record keeping of committee actions
- unique circumstances associated with the position and community
- method for involving the full board and staff in the selection process

Advertisement

It is good practice to conduct a search even if there are staff members qualified for the position. The eligible staff members should be encouraged to apply. All should understand that the goal of the search is to select the best-qualified person for the job. All applicants should receive consideration and due process in accordance with equal opportunity laws.

The job advertisement is the primary vehicle for publicizing the vacancy and attracting applicants. It should be carefully worded and might contain the following:

- job title
- duties/responsibilities
- qualifications (including education, experience, and personal characteristics)
- salary range and minimum salary
- fringe benefits (including vacation and retirement)
- request for resume and references
- date of availability
- organization contact (preferably a specifically named person)

- closing date for applications
- an equal opportunity employer statement

The job advertisement can be posted/distributed to:

- Jobline, a listing of current openings posted on the OLIS website
- library schools in Rhode Island and the Northeast
- national professional journals such as *Library Journal*, *Library Hotline*, and *American Libraries*
- local newspapers

Screening

After the closing date for applications, the search committee screens all applications, deciding between qualified and unqualified applicants. Candidates who do not meet the requirements for the position should be notified immediately.

Candidates who satisfy the requirements for the position become part of an official pool of applicants for further consideration. Narrowing this pool to a list of final candidates is perhaps the most difficult part of the search committee's task. Success of the evaluation process is contingent upon the formulation of an appropriate set of criteria against which all candidates can be rated objectively. After this process is completed, the search committee should be able to agree on three to five candidates to be called for interviews. It is appropriate to send each candidate background information about the library and the community, including the library's budget, annual report and long-range plan. Before the interviews, a plan for the process should be developed:

- Designate one person to handle the planning of the interviews, making contact with the candidates to schedule the interviews.
- Designate one person to conduct interviews with others assisting. Limit the interview team to a reasonable size, usually three to five people.
- Identify what expenses will be paid or reimbursed and notify each candidate.
- Plan the location for the interview, accommodations for the candidate, a tour of the library and community, etc.
- Include an opportunity for the candidates to meet the library staff.
- Agree upon a set of specific questions to be asked of each candidate.
- Allow adequate time for discussion. The interview is a mutual evaluation process. The committee should provide the candidate with a fair, accurate picture of the library, working conditions, and expectations.
- Allow time between interviews to complete evaluation sheets while the members' reactions are still fresh.

The Interview

Agree to a standard list of questions to be asked of each candidate. This makes for a smooth interviewing process and helps to assure that only legal questions are asked and that each candidate responds to the same set of questions. The interview is an important step in selecting the most qualified person for the job; proper judgment here can help reduce turnover and organizational problems.

The chair can wrap up the interview process with comments covering the timetable for the final selection and the notification procedure.

Final Decision

After all interviews have been completed, the search committee meets to discuss the results and to rank the candidates in order of preference. References are checked on the first choice. Following this, a recommendation is made to the full board. Once the library board agrees on a candidate to be the new director, the chair of the library board makes an official offer, which includes a written notice of appointment. Such letters of appointment typically cover position title, starting date, salary, moving expenses, fringe benefits, and a deadline for the candidate to respond to the offer (normally two weeks). Upon receipt of written acceptance, publicity about the appointment is usually sent to the local newspapers, to library publications, and to appropriate local offices.

Write all other candidates interviewed, thanking them and informing them of your decision **only after** acceptance has been received. If the first choice declines or is unavailable, the board can consider the second choice.

After the New Director Arrives

Orient the new director and assist him/her with relocation. Provide help with school and housing information and additional information on the library and the community. A subscription to the local newspaper is a valuable tool to acclimate the new library director.

Welcome the new director. News releases and photographic coverage should be arranged. Personal introductions to staff members, trustees, community representatives, and local government officials should be scheduled promptly. An open house or reception hosted by the board, and assisted by the Friends of the Library, is a standard courtesy.

RELATIONSHIPS BETWEEN THE BOARD AND THE DIRECTOR

It is critical to the progress of the library that the board and the director work together toward common goals in a climate that fosters a free and open exchange of viewpoints. The expectations, roles, and responsibilities of each should be clearly delineated and understood.

According to the library's written personnel policies, there is generally an initial evaluation period that allows the board and the director time to develop a working relationship. During this time either party may reconsider the arrangement.

A reciprocal relationship will flourish if the board follows these guidelines:

1. Hire with enthusiasm after an appropriate search.
2. Before hiring, be clear about your expectations of the director and your goals for the library.
3. Reveal any special problems the library has.
4. Support the director (new or continuing) in pursuit of goals and objectives decided on in discussion between board and director.
5. Handle problems as they arise. Be patient with the director while sticking to the goal of excellence in library management.
6. Define the roles of the board and the director and stick to the division, but provide mutual support in performance of the roles.
7. Treat the director as a team member and leader of the library, a participant in decision-making, and as the professional advisor and resource.
8. Call for adequate reporting from the director.
9. Encourage the director to be involved in professional activities and give financial support to this participation.
10. Support the director in his or her position as administrator and stay out of the day-to-day operation of the library. Encourage the director to feel free to talk with the board members about problems.
11. Talk about the library in the community, including praise for the director. Introduce the director to the community. Aim for visibility for board, director, and library.
12. Encourage the director to be a futurist--aware of trends and projects of others.
13. Maintain a professional relationship with the director. Pass on the good things that trustees hear about their library. Share the success.
14. Pay the director an adequate progressive salary, a standard that applies to staff as well. A contented, adequately-compensated staff responds well to the direction of a head librarian and to the desires of the board.

TRUSTEES AND STAFF RELATIONSHIP

In the interest of efficient administration, the board should develop a clear policy on its relationship with employees of the library. While the board should strive to create a climate of cordiality and friendly interest with staff, members should not personally intervene in matters between the staff and supervisors.

The director, as the chief administrator of the library, is responsible to the board for all personnel matters. Good management practices suggest that staff concerns, and all other administrative questions, should be brought to the attention of the board by the director.

EVALUATING THE LIBRARY DIRECTOR

Performance appraisal of the library director is an integral part of the evaluation of the library as a whole. It is a continuous process that should be used as a means toward determining the accomplishment of organizational goals and objectives and how well the library is being managed.

A formal evaluation of the director is good management practice and should be done regularly, at least on an annual basis. The evaluation should be based on the job description and/or negotiated objectives agreed upon at the time of hiring or soon thereafter. The criteria should be defined specifically, providing the board with evidence of good management if the objectives are met.

Purposes of the Performance Evaluation:

- to provide the director with a clear understanding of the board's expectations
- to ensure that the director is aware of how well the board's expectations are being met
- to serve as a formal vehicle of communication between the board and director
- to identify the board's actual concerns so that appropriate action can be taken
- to document the justification for salary adjustments

Methods of Evaluation

To be effective the evaluation method and process must be designed to accommodate your specific local situation. Directors can be judged in many ways, but quality of performance is clearly the best measure.

- Has the director managed the operation of the library so as to provide the intended services?
- Has the director managed the staff so that operations are friendly, efficient, and cost-effective?
- Has the director been a leader in making the library an important service in the community?
- Has the director moved forward satisfactorily on achieving the goals and objectives outlined for the library and for the director?
- Has the director provided sufficient information to the board so that it can perform its duties?

- Has the director kept in touch with new trends in library service and relayed these to staff and board?

These are among the questions boards might use in assessing the director's performance. Any evaluation of the director should be based on how the library is doing. Is there satisfaction in the community? Is there praise for the library? Is there movement toward goals?

The American Library Trustee Association (ALTA) has published a guide entitled *Evaluating the Library Director* that is useful in developing an evaluation method for your library's situation. It is available for loan from the Professional Collection of the Office of Library and Information Services.

Developing the Evaluation Process

- Board and director jointly develop a list of factors that lend themselves to objective evaluation.
- Board develops general evaluation method, criteria, rating scale, and form.
- Board and director identify goals, long-range plans, and specific areas that need attention.
- Director prepares a set of objectives with time line.
- Board reviews objectives and suggests changes, if appropriate.
- Board and director negotiate changes in objectives.
- Director and board confirm objectives.
- Director handles implementation of actions to meet objectives, including delegation of tasks to staff.
 - Director makes periodic reports to board on progress toward achieving objectives.
- Board and director make revisions to objectives negotiated.
- Board conducts annual formal evaluation review.
- Board provides periodic feedback to the director.
- Evaluation process is repeated.

Expectations and Evaluation

Directors are accountable to many varied and sometimes conflicting constituencies. The board and the director must recognize these groups and agree on the priority of the demands of each. These constituencies might include:

- elected officials and the appointed governing officer who supervises other local government department heads
- library staff members who have diverse personal expectations for their director
- special interest groups who exert pressure on the director to respond to their concerns
- individual members of the board of trustees who have personal priorities for the library and the director

Good communication, effective public relations, a written plan, and clear policies will all help the board and director to deal with any conflicting expectations.

Remember: If the librarian is having a problem, give timely help X don't wait for an annual evaluation. Single episodes, slips, or errors should be handled when they occur, not held in waiting for an annual criticism.

The board's performance must also be evaluated as part of this process. Did the board conduct itself well, abide by the board/director divisions of responsibility, set objectives and work toward them, listen to reports, provide needed assistance throughout the year?

The evaluation should be a constructive process. Most library directors welcome the opportunity to review past performance objectively against established criteria. A good evaluation interview will include both strengths and weaknesses and will help the director be more effective in managing the library.

DISMISSAL OF THE LIBRARY DIRECTOR

One of the most difficult situations a board may have to face is the dismissal of the library director. It is an action that should not be taken lightly because it will reflect on the future of the library and on the career of the director.

There is less likelihood of having to take this action if care is taken in the hiring process and the board has a well-developed evaluation procedure.

If efforts taken to improve the difficulty are unsuccessful, and the working relationship between the board and the director reaches a point that it is not possible to continue, then dismissal becomes a last resort.

Generally the reasons for discharge are for poor performance or infraction of rules. Both the reasons for dismissal and the procedures to be followed should be stated explicitly in writing and adopted by the board as policy. It is important to avoid vague terms. An appeals procedure should be included to ensure fairness and to protect the director from false charges.

In considering dismissal of the director, the board should ask itself the following questions:

- Has the board acted responsibly?
- Has the board dealt with problems as they arose?
- Has the director received written notification of his/her dismissal and the reasons for dismissal?
- Has the director been given a full hearing?
- Have the charges been listed explicitly?
- Can the board defend its position?
- Does the board need legal advice?
- How will the dismissal be handled with the public?
- Do the policies need to be changed?

The board should understand that its responsibility is to provide the best possible library service.

Every effort should be made to ensure that personalities and biases are not leading factors in a decision to replace the director.

Are personnel policies reviewed periodically?

Do board members refrain from intervening in matters between the staff and supervisors?

Do the board and director jointly determine the criteria to be used in evaluating the director?

SUMMARY OF PERSONNEL RESPONSIBILITIES

Board of Trustees

Employs a library director in compliance with library standards and develops guidelines for staff selection.

Provides adequate salary scale and fringe benefits for all employees.

Adopts personnel policies and personnel manual.
personnel

Library Director

Hires and directs staff.

Suggests improvements needed in salary and working conditions. Utilizes skills and initiative of staff members to the library's advantage.

Provides board with recommendations and materials to review. Maintains a
manual.

Board of Trustees

Recommends qualifications and candidates for board. Notifies appropriate authorities of board vacancies. Provides orientation for new trustees.

Develops standards for evaluating library director's performance. Reviews director's effectiveness.

Library Director

Recommends criteria and assists in the selection of new trustees. Participates in orientation by introducing library staff, explaining procedures, etc.

Suggests basis for evaluation criteria. Provides materials for board to study. Maintains records of all personnel.

JOINT RESPONSIBILITIES

Observe all local, state, and federal laws that relate to current employment practices.

Provide in-service training for professional development of staff members and effective implementation of policies. Provides opportunity for continuing education and advancement of staff and trustees.

Trustees and the Library's Budget

Public library trustees are legally responsible for overseeing library finances. Accountability and awareness are keys to meeting fiscal responsibilities. Accountability is imperative because public funds are being expended. Awareness is crucial because the board cannot make wise budgeting decisions unless members are aware of how the library is funded, what it costs to run the library, what the library needs, and what those needs will cost.

Planning, budgeting, and public relations are linked together. Planning is about understanding the library's role in the community and its strengths and weaknesses so needs can be identified and priorities determined. Based on those understandings, goals are set and strategies designed to accomplish goals. Since it makes little sense to make plans that can't be supported financially, budgeting and planning go together. Plans are made within the limits of what is fiscally possible and budgets reflect planning decisions. Public relations, an ongoing process, is important because if the plan and budget are not understood and supported by the public and the library's funding authority, the board's work is in vain.

Monitoring how the library's budget is being spent is a continual trustee activity. Funds must be spent appropriately and legally, accurate records must be kept, and changing costs which will affect the budget must be tracked.

Tips for Successful Budget Planning

First, know who does what. A necessary first step in successful budget planning is knowing who has authority and who does what in the budget planning process. Written policies and procedures should outline responsibilities and roles clearly. Developing the budget should not be up to the library director alone. Developing a budget is a team process. Trustees can play a vital role in creating the budget and getting it approved because they are the library's link to the community and its government.

Understand the budget's planning context. The planning process is central to developing the budget since the budget must reflect the purpose and priorities of the library. Decide your priorities, make a plan that reflects those priorities, and then tie your budget to the plan. Be able to tell your funding agency what you are doing for your community, what you want to do, and what the expected results are. Requests, in other words, should be made within the context of a planning process. It's not enough to ask for X percentage in increased funding. Tie requests to clearly stated purposes and priorities.

Give yourself and others time. It takes time to make a budget. Boards should develop planning calendars. Since budgeting, like planning, is a cooperative process, the director and staff must be given adequate time to make requests and recommendations. Local funding authorities must be given enough time to consider the budget, too. Think long range, so funding resources for future growth can be identified or developed.

Question everything. Don't simply manipulate a pre-existing pattern by adding and subtracting percentages or figures from programs and columns that were set up before. Again, the budget is the tool for accomplishing specific goals. When a goal has been accomplished, phase out the program or project that was designed to meet it and make a case that funding should be moved to the next priority or purpose.

Be realistic. Tune in to what is happening in your community. Understand the community's ability to pay so you know what can and can't be expected. Understand the competing demands of other agencies on your funding agency so you know your fair share in relation to others. Use the Office of Library and Information Services' annual *Comparable Statistics of Rhode Island Public Libraries* to compare your situation with others and to understand your town government's level of effort.

Don't restrict your budget to available funding. Remember that funds may increase or become unexpectedly available. Be ready to make use of those funds. Be in a position to find and use other sources of income such as federal and state grants and contributions. Not all money has to come from local government sources. Grants, donations, and sponsors can often be used for one-time projects. Look for community support for alternative funding when appropriate. When you find and use other funds, be sure your funding agency knows and publicize it within the community.

The library is a business. A shoe store doesn't sell computers. It sells shoes. That is its mission or purpose. If it doesn't sell shoes, those in charge will be held accountable. Understand what your library is supposed to accomplish. For example, if your mission says that the library's role is to

supply popular reading materials to the community, be sure it is playing that role and that the budget makes it possible. Remember that those who are responsible for the budget must be accountable.

Keep it simple and tell the truth. Make the library and its needs understandable and accessible. When talking to the public or officials, avoid acronyms and professional vocabulary that may be misunderstood. Do not exaggerate or underestimate. If you say something will happen if the budget is cut, you should be sure that those effects will happen. Be mindful of the importance of credibility.

There is nothing secret about the budget. People have a right to know how their money is spent. Make the budget understandable. Learn how to use simple and familiar comparisons to illustrate the value people are getting for their tax dollars. For example, instead of using large figures, use per capita figures for expenditures and then compare these to the average cost of a meal in a restaurant, the cost of one hardbound book, or the price of a ski lift ticket.

Read, listen, and learn. Learn from other agencies about how they develop and present their budgets. Pay attention to success and learn from the examples of others. Above all, listen to your funding agency and know what they are looking for and what impresses them.

When presenting the budget, tell your story and make your case. Don't justify only budget increases, but justify the base as well. Tell them why the community needs the service and what is unique about what you do. Describe your contributions and tell how taxpayers benefit. Tell who uses the service and provide stories about people whose lives have been improved or made richer because of the services the library provides. Outline your goals and plans. Be sure they know you are accountable. And last, the use of graphs and/or charts is always effective in illustrating your case and should be used whenever possible.